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TRAVEL PRINTOUT
U.S. Travel Data Center
Research News for the U.S. Travel Industry

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Tourism's Top Twenty Provides Answers To Many Questions About The Travel Industry

Here's a little quiz for you.

Can you name the state that has the largest tourism advertising budget in the United States?

ANSWER: Texas

What was the top theme park in the United States in 1989?

ANSWER: Walt Disney World/MGM Studios/Epcot Center, Lake Buena Vista, Florida

Which National Park is the largest by acreage?

ANSWER: Wrangell-St. Elias National Park, Alaska

What airline spent the most on advertising in 1991?

ANSWER: Delta

The U.S. Travel Data Center, in conjunction with the Business Research Division of the University of Colorado, will soon publish the fourth edition of **Tourism's Top Twenty**, a book aimed precisely at answering these kinds of questions.

"This publication will answer many of the questions most asked by travel industry people who contact us," said Suzanne Cook, executive director of the Data Center.

Tourism's Top Twenty, published every four years since 1980, presents facts and trends that make up not only the domestic travel and leisure industry, but also encompasses facts relating to the international travel market.

"Our goal in publishing this book is to provide a quick fact book so users don't have to dig through 50 different volumes to find facts they need to know," said Dr. Charles Goeldner, professor of marketing and tourism at the University of Colorado. "We have already done the work for you."

"We have taken the most current numbers and made them available in one convenient package." --Dr. Charles Goeldner, professor of marketing and tourism at the University of Colorado

This book provides a wide range of listings from the most frequently used ports of entry and departure for international inbound and outbound travelers to the top participation sports in the United States. The publication also lists the top hotels, motels and resorts in the world by number of properties, room sales and number of rooms. In addition, listings provide information on advertising expenditures of airlines, cruise lines and states along with information pinpointing the most widely-used travel agencies in the United States and their incomes. Top states for hunting and fishing licenses are also listed.

A sample of additional information available in this publication follows:

**In 1991, McDonald's was the largest restaurant chain in the world with 11,803 locations. Kentucky Fried Chicken was next with 8,187.

**In 1990, American Airlines carried more passengers (73,227) than any other U.S. passenger airline. Delta was second with 65,729 passengers.

**American Express was the highest grossing travel agency in 1991, accumulating $6.9 billion in sales.

**The Hertz Corporation was the leading car rental company in the United States in 1989 with $3.1 million in total sales in 1989.

Taking research from many different sources, this publication combines information from state agencies, federal bureaus, private industry and trade publications.

" We have taken the most current numbers and made them available in one convenient package," said Goeldner.

With over 100 fact-filled pages, **Tourism's Top Twenty** is a bargain at $50. For more information or to order a copy of **Tourism's Top Twenty**, contact the Data Center's marketing department at (202) 293-1040. (Full and state members receive a 20% discount.)

SPECIAL ANNOUNCEMENT:
The U.S. Travel Data Center will have its annual membership meeting prior to the Travel Outlook Forum, October 28 in Washington D.C. at the Sheraton Washington Hotel. The meeting will be held in the Dover Room from 7:45 a.m. to 8:45 a.m. Data Center members and non-members are encouraged to attend. The Data Center staff will review custom research available through the Data Center.

Cost Of Traveling In U.S. Inches Up In August

For the third consecutive month the cost of traveling in the United States inched higher. According to the U.S. Travel Data Center's Travel Price Index (TPI), the price of traveling rose 0.3 percent in August.

A 1.3 percent increase in the costs of lodging and a 0.9 percent rise in the price of entertainment offset a drop in the price of transportation and air fares. The percent change in these components reflect the full price fares and room rack rates. They do not reflect the recent price wars and discounting present in both industries. Overall, the TPI rose 2.7 percent compared to the same period last year.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, increased to 151.8 (1982-84=100) during August. The TPI indicates the price changes in travel goods and services available to the consumer in the United States and does not necessarily represent changes in average fares, rates and other costs the travelers actually paid.

The Data Center releases the Travel Price Index during the last week of each month. For more information on the Travel Price Index, contract Joseph P. Horak (202) 293-1040.

TRAVEL PRICE INDEX AND COMPONENTS

AUGUST 1992	MONTHLY % CHANGE JULY 1992 TO AUGUST 1992	ANNUAL % CHANGE AUGUST 1992 TO AUGUST 1991
TPI COMPONENTS		
TRANSPORTATION	-1.3	-0.5
Airline Fares	-1.5	-3.3
Intracity Public Trans.	0.2	5.7
Other Intracity Trans.	-1.1	2.0
Motor Fuel	-1.1	2.4
LODGING	1.3	6.0
FOOD AND BEVERAGES AWAY FROM HOME	0.1	1.7
ENTERTAINMENT	0.9	2.9
TRAVEL PRICE INDEX	**0.3**	**2.7**
CONS. PRICE INDEX	**0.3**	**3.2**

(SOURCE: U.S. TRAVEL DATA CENTER)

TIA Announces A New Travel Industry Survey

In an effort to aid the marketing efforts of its members and the U.S. travel industry it serves, as well as provide economic analysts and consumers a greater understanding of the travel and tourism industry, the Travel Industry Association of American (TIA) this month released the first quarterly edition of Travelometer (SM), a new and unique survey of U.S. travelers.

Indicating that, for the fall 1992 travel season, most Americans who travel plan to travel as much or more than they did last year, and that travelers feel generally comfortable about the state of their own finances and that of the U.S. economy as well.

"It is a service to our members and to the industry they comprise, providing them with a forecasting and short-term marketing tool," said TIA President Edward R. Book. " It carries out the mandates of TIA's charter and current Strategic Plan in doing so by positioning TIA as an entity for promoting and explaining the nation's travel industry."

Commissioned by TIA, the U.S. Travel Data Center prepares the Travelometer by incorporating new questions each quarter into its National Travel Survey. Based upon data collected each month by telephone interviews from a national probability sample of 1,500 adults, the National travel Survey serves as the basis for a wide variety of respected and reliable reports.

The Travelomenter is available on a quartertly basis ($15) or by yearly subscription ($50). For more information, contact Kirsten Luescher at (202) 293-1433.

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research and an affiliate of the Travel Industry Association of America.

Dr. Suzanne Cook, Exec. Dir.

Joseph P. Horak, Editor

TRAVEL PRINTOUT reports on Data Center projects, national travel research and trends in the travel industry. Subscriptions are $75 per year; outside the U.S., $80. ISSN: 0744-6233

Travel Outlook Forum Schedule Set

The following is the final schedule for the U.S. Travel Data Center's 18th Annual Travel Outlook Forum, co-sponsored by the Travel and Tourism Research Association, to be held October 28, 1992 at the Sheraton Washington Hotel in Washington D.C.

7:30 AM Registration

7:45-8:45 AM

CONTINENTAL BREAKFAST

Sponsored by AAA World Magazine

8:45-9:00 AM

1993 TRAVEL OUTLOOK FORUM WELCOME

- Peter Shelly, Vice President of Sales, Radisson Hotels International, and Chairman, 1992 Travel Industry National Conference/1993 Travel Outlook Forum Planning Meeting
- Edward R. Book, President, Travel Industry Association of American
- Jerry Foster, President, Travellers International, and Chairman, U.S. Travel Data Center
- Joan McClellan, President, McClellan Corporation International and President, Travel and Tourism Research Association
- Suzanne D. Cook, Executive Director, U.S. Travel Data Center

9:00-9:30 AM

1993 OUTLOOK -- THE ECONOMY

- Eugene J. Sherman, Senior Advisor, Federal Home Loan Bank of New York

9:30-10:00 AM

TRAVEL TRENDS IN 1992

- Suzanne D. Cook, Executive Director, U.S. Travel Data Center

10-10:15 AM

COFFEE BREAK

Sponsored by Travel & Meetings Digest

10:15-10:45 AM

1993 OUTLOOK -- INTERNATIONAL TRAVEL

- Harvey M. Shields, Director, Office Of Research, U.S. Travel And Tourism Administration.

10:45-11:45 AM

REGIONAL TRAVEL OUTLOOK

MODERATOR:

- Jerry Foster, President, Travellers International, and Chairman, U.S. Travel Data Center

PANEL:

- Glenn O. Couvillon, Managing Director, Travel South USA
- John F. Edman, Executive Director, Mississippi River Country, USA
- Brad Smith, Executive Director And CEO, Foremost West, Four Corners Regional Tourism Organization

12:00 noon-1:30 PM

LUNCHEON

Sponsored by Travel Weekly Newspaper and Las Vegas Convention and Visitors Authority

Presentation By:

- Alan Fredericks, Editor-In-Chief, *Travel Weekly* Newspaper

CONCURRENT SESSIONS

1:45-2:45 pm

SESSION I: Outlook For Air And Auto Travel

MODERATOR:

- Dr. Douglas C. Frechtling, Visiting Professor of Tourism Administration, The George Washington University

PANEL:

- Thomas R. Crosby, Managing Director, American Automobile Association Travel Publishing
- David A. Swierenga, Assistant Vice President - Airline Industry Data, Air Transport Association of America

SESSION II: Outlook for Accommodations and Attractions

MODERATOR:

- Joan McClellan, President, McClellan Corporation International and President, Travel and Tourism Research Association

PANEL:

- Mark V. Lomanno, Research Manager, Smith Travel Research (His appearence is sponsored by ***American Hotel & Motel Association***.)
- Dr. Conway Rucks, D.B.A., President, Marketing Information Technologies, Inc.

2:45-3:00 PM

COFFEE BREAK

Sponsored by USA Weekend

CONCURRENT SESSIONS

3:00-4:15 PM

SESSION I: Outlook for Business Travel Panel

- Elizabeth M. Stewart, Manager of Market Research, U.S. Travel Data Center
- Nan K. Moss, Assistant Vice President of Marketing Programs, Hyatt Hotels Corporation
- John Riener, President, Carlson Travel Network - Commercial
- Beverly D. Shipka, Economist/Manager, Macro Forecasting, American Airlines

SESSION II: Leisure/Family Vacation Travel Panel

- Peter Mason, Travel Classification Manager, *Better Homes & Gardens*
- Tom R. Frenkel, CTP, Vice President, Presley Tours, Inc.
- Helen N. Marano, Research Manager, Orlando/ Orange County Convention & Visitors Bureau, Inc.
- Barbara Wickliffe, Director of Marketing Planning and Research, Best Western International, Inc.

4:15-5:00 PM

GENERAL SESSION:

"While the 1990's Haven't Even Started, The Consumers Are Already In The 21st Century"

- Watts Wacker, Executive Vice President, Yankelovich Clancy Shulman

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	LAST PERCENT CHANGE MONTH / YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales					
Hotels, Motels, Other Lodging (1)	JULY	$5,910	millions	-9.7	7.9	5.4
Eating and Drinking Places (2)	AUG	$16,978	millions	-0.8	-5.1	1.9
Gasoline Service Stations (2)	AUG	$11,062	millions	-1.9	-3.0	-2.5
Consumer Lodging Demand						
Hotels/Motels Occupancy Rates (3)	JULY	62.9	percent	0.8	2.4	2.8
Real Demand For Commercial Lodging (4)	JULY	72.8	millions	0.5	5.4	4.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger Miles	AUG	36.8	billions	4.0	12.7	4.3
Int'l Revenue Passenger Miles	AUG	13.7	billions	6.2	2.1	16.6
Highway Traffic Volume (6)						
Rural Arterial Vehicle Miles	JUNE	50,048	millions	1.8	2.7	4.5
	JULY	53,821	millions	7.5	3.1	4.3
Rail Passenger Traffic (7)						
Amtrak Passenger Miles	JULY	581.4	millions	29.1	-3.8	-3.9
Travel Price Index (8)						
(1982-1984 = 100)	AUG	151.8		0.3	2.8	2.5
Visitor Vol. at National Park Service Areas (9)						
Recreational Visits	JULY	41.2	millions	26.0	-0.4	2.9
	AUG	39.0	millions	-5.1	-1.0	2.1
Overnight Stays	JULY	3.5	millions	46.6	1.0	5.0
	AUG	3.5	millions	-2.0	-5.0	2.0
Foreign Arrivals to the United States						
From Overseas (10)	MAY	1,474,751		12.3	5.4	19.1
	JUNE	1,551,099		5.2	6.9	16.5
From Canada (11)	JULY	2,405,502		83.3	-8.0	0.1
From Mexico (10)	MAY	104,413		-17.8	-6.3	7.4
	JUNE	126,303		21.0	5.1	7.0
U.S. Citizen Departures						
To Canada (11)	JULY	2,079,776		43.8	0.5	-0.2
Domestic Demand For Motor Gasoline (12)						
Barrels Per Day	JULY	7,618	thousands	2.2	0.8	1.1

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) National Parks Service, preliminary, unadjusted for differences in reporting units. (10) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (11) Statistics Canada. (12) U.S. Department of Energy, prelim.

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